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Introduction

This User Manual contains all essential information for the user to setup and maintain the iTAX information system for use in any Local Government Authority (LGA) in Tanzania. This manual includes a description of the system's maintenance module, its functions and capabilities and step-by-step procedures along with many screenshots for easy access and use. The maintenance and customization of iTAX is designed to be as simple as possible with most of the windows in its maintenance module sharing a common layout and functionality.

This User Manual is intended for use by iTAX technical administrators. It is necessary for the initial setup of the system in an LGA and more importantly, in keeping the information used by the system relevant to the expected changes brought about by political and administrative actions. Users must be careful though, since the information managed in this module have module-wide and even system-wide effects and mistakes could possibly compromise the system's entire database. However, as long as this module is properly used it would allow the iTAX System to maintain flexibility and be relevant for the foreseeable future.

1. Installation

To install iTAX on a client machine simply insert the installation disk into the machine's optical drive, the auto-play will ask confirmation to run the iTAX installation setup file. Click the yes button and the setup will automatically perform the installation of the entire system including the database and the database connection settings.

By default an administrator account is created with the login name of 'itax' and the password of 'mapato'. This is a super-user account that has unrestricted access to all the modules of the system.

2. Property Rates

At the heart of the iTAX System is the Property Rates assessment, collection and reporting module. This module was tailor-made for the unique Property Rates administration in Tanzania. Since Property Tax is a local tax governed by the local government authorities and therefore varying in interpretation from one municipality to the next, this module was designed to be as flexible and customizable as possible eliminating the need to reengineer the code itself.

Maintenance of the Property Rate values is accessed through:

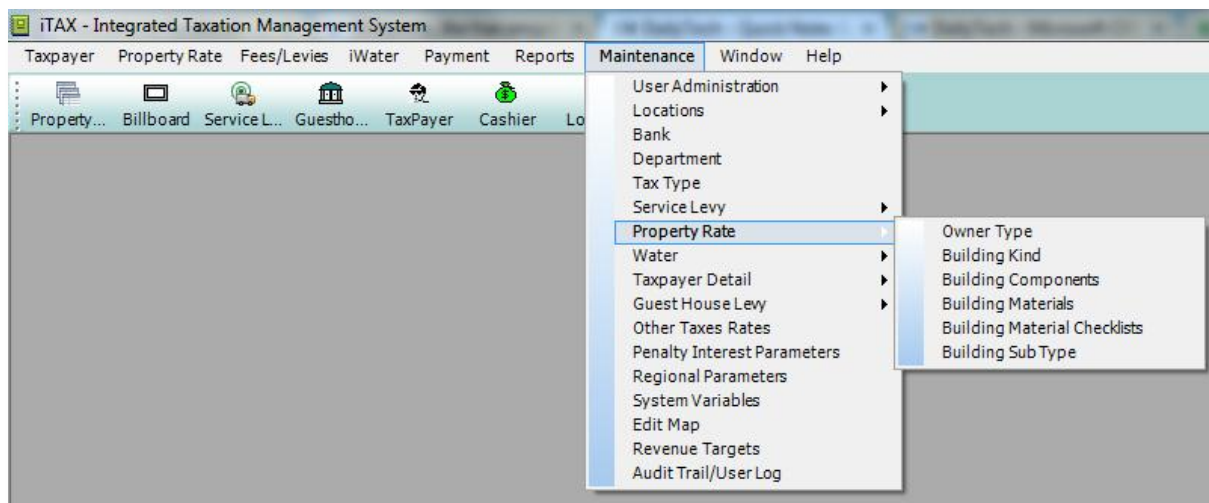


Figure 1. How to Access the Property Rate maintenance.

USING THE ITAX MAINTENANCE WINDOW

Majority of the windows in iTAX's Maintenance Module share a common layout and functionality. This layout has all the command buttons at the bottom and has two *data windows*. The one at the top displays all the current saved rows. When a user clicks on a row, the row becomes selected and becomes available for editing or deleting. The lower data window is an entry form in which the user can enter new data or edit existing data.

- **To Enter new data:**
 1. Click the *NEW* button. The lower entry form will be enabled and the fields will change from greyed out to white.
 2. Enter the information
 3. Click the *SAVE* button.
 4. The system will prompt if there is any required field missing otherwise the new record will be saved and a saving successful prompt will appear.
- **To Edit existing data:**
 1. Select a record from the top data window by clicking on a row
 2. Click the *EDIT* button. The lower entry form will be enabled and the fields will change from greyed out to white.
 3. Edit the information
 4. Click the *SAVE* button.
 5. The system will prompt if there is any required field missing otherwise the new record will be saved and a prompt will appear.
- **To Delete existing data:**
 1. Select a record from the top data window by clicking on a row.
 2. Click the *DELETE* button.
 3. The system will prompt for a confirmation of the deletion. Click the *YES* button.
 4. Click the *SAVE* button. (NOTE: The system allows multiple rows to be deleted before the user decides to click the *SAVE* button.)
- **To Undelete deleted data:**

Before the *SAVE* button is clicked after rows have been deleted the deleted rows can be recovered by clicking the *UNDELETE* button.

A.Owner Type

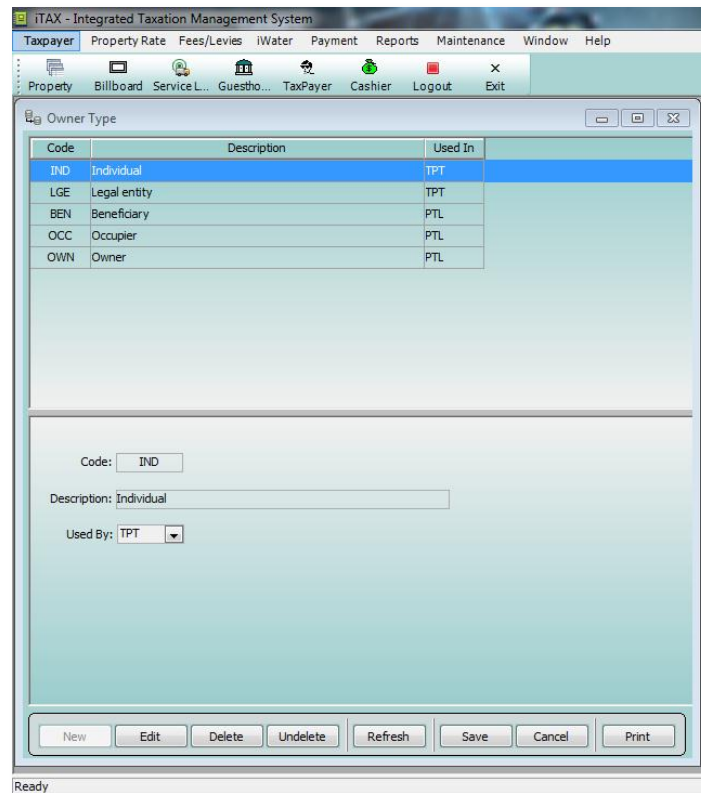


Figure 1a. The Owner Type maintenance window

This window allows the user to enter new data and edit or delete existing data about the different types of owners of a property. For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).

B. Building Kind

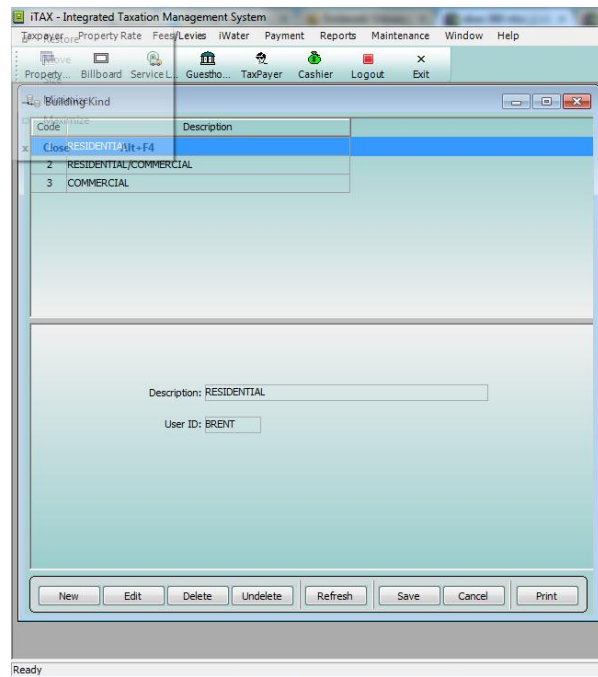


Figure 1b. The Building Kind maintenance window

Based on Tanzanian law only buildings are considered real property. This is the window where the user can enter new data, and edit or delete existing data about the different types of buildings that constitute a real property in Tanzania. For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).

C. Building Components

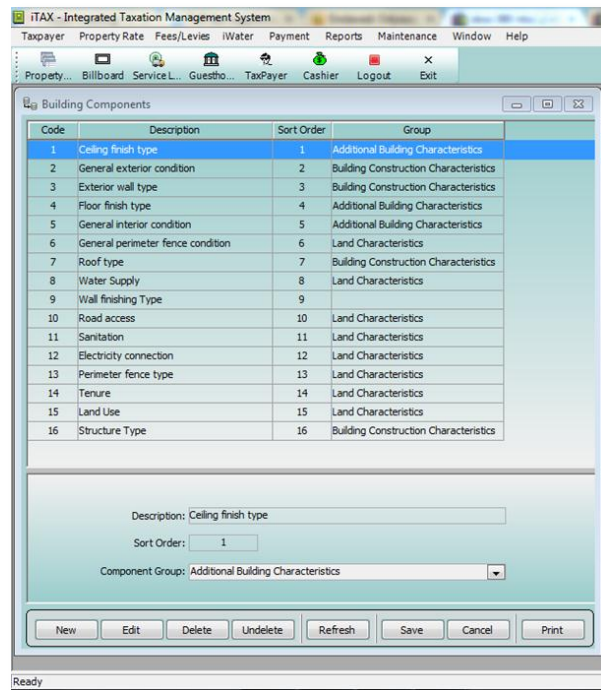


Figure 1c. The Building Components window

According to Tanzanian Property Tax laws there are certain building characteristics that are used as quality factors in the assessment of the tax. These characteristics are divided into groups and this window is where the building characteristics' groups called Building Components are set. For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).

These building components will appear in the Property Entry Window here:

iTAX - Integrated Taxation Management System

Property Rate Entry

PRN : 0905- - - - Doc Ref No : Year Bundle No Page No

Rateable : ☒ Special Property : ☐

PROPERTY LOCATION

District : Mtware Mikindani Rate Block : Ward : Object No : Mtaa : Plot No : Bldg No : 1

BUILDING CHARACTERISTICS

Building Type : Sub Type : Total sqm : .00 Construction Year : No. of floors : ☐ Pic uploaded Need Resurvey : ☐ Issue New Bill : ☐ Pic no : Cam no :

SIGNATURE

Enumerator : Name : Date : 00/00/0000 Supervisor : Name : Date : 00/00/0000 Owner Date Signed : 00/00/0000 Quality Multiplier : .00 Tax Rate :

Building Construction Characteristics

Land Characteristics	Building Construction Characteristics	Additional Building Char
General perimeter fence color QM	Sanitation QM	
Excellent	None	
Fair	Pit latrine	
Good	Septic tank	
Poor	Sewer	
Water Supply QM	Perimeter fence type QM	
Borehole	Brick wall	
Metered/Main	Iron mesh	
Other/None	Metal sheet	
Rain	None	
River	Other	
Stand Tap	Plant	
Road access QM	Steel rod/bar	
Earth road	Timber	
Foot path	Tenure QM	
Murram/gravel road	Other	
None	Leasehold	
Other	Unbilled	
Tarmac road		

Buttons: Search, New, Edit, View Picture, Delete, Save, Cancel, Print, Upload Pic, Post Debit, Close

Figure 1d. Building Component information reflected in the Property Entry Window

D. Building Materials

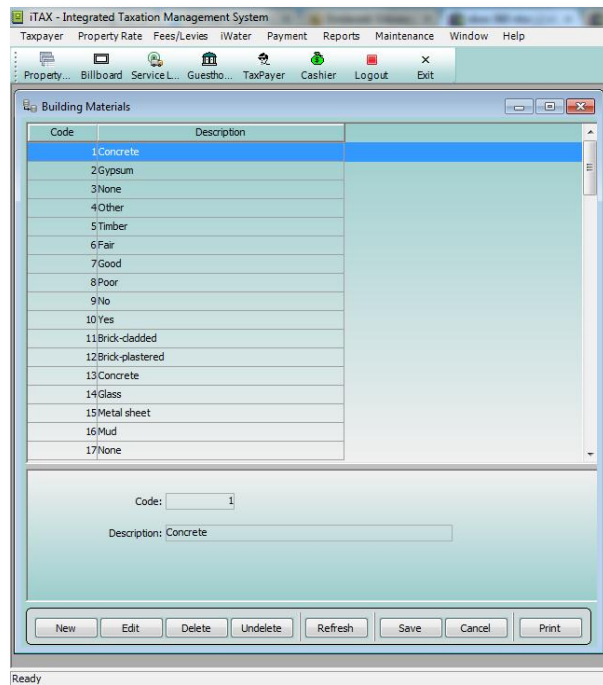


Figure 1e. The Building Materials maintenance window.

This window contains the items that belong under the groups entered in the Building Components window. For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).

These building materials will appear in the Property Entry Window here:

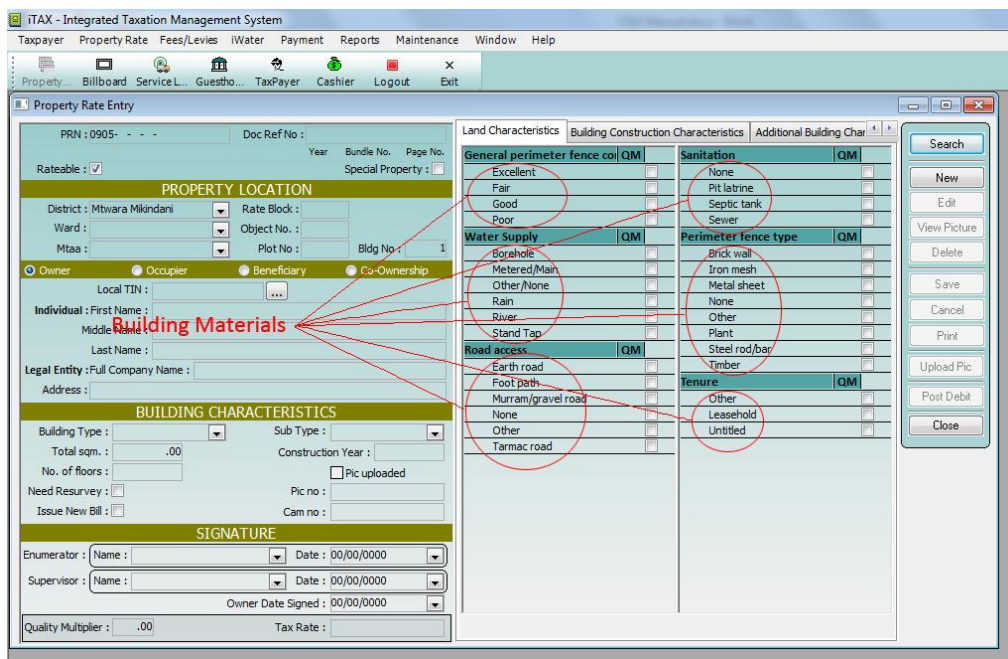


Figure 1f. Output of the Building Materials information reflected in the Property Entry Window.

E. Building Material Checklists

Code	Material	Component	Tab No.	DW No.	QM
CEILING FINISH TYPE					
72	Chipboard	Ceiling finish type	3	1	
1	Concrete	Ceiling finish type	3	1	0.94
2	Gypsum	Ceiling finish type	3	1	1.10
3	None	Ceiling finish type	3	1	0.90
4	Other	Ceiling finish type	3	1	1.00
71	Softboard / Hardboard	Ceiling finish type	3	1	
5	Timber	Ceiling finish type	3	1	1.15
ELECTRICITY CONNECTION					
9	No	Electricity connection	2	1	
10	Yes	Electricity connection	2	1	
EXTERIOR WALL TYPE					
11	Brick-cladded	Exterior wall type	2	1	1.00
12	Brick-plastered	Exterior wall type	2	1	1.00
13	Concrete	Exterior wall type	2	1	1.60
14	Plaster	Exterior wall type	2	1	1.40

Component : Ceiling finish type
Material: Chipboard
Tab No. : 3
Datawindow No. : 1
Quality Multiplier :

New Edit Delete Undelete Refresh Save Cancel Print

Figure 1g. The Building Material Checklist window.

This window is where the materials and the components are grouped together and the QM or Quality Modifiers are set. The QM is a percentile value applied to a property's final assessed value used in some assessment scenarios. The user also sets the Tab page where the group will appear as well as the *data window*. The data window refers to the two panes within each tab page in the Property Entry window. 1 refers to the window on the left while 2 refers to the window on the right.

For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).



Figure 1h. Where the tab pages and data windows are located in the Property Entry window.

F. Building Sub-Type

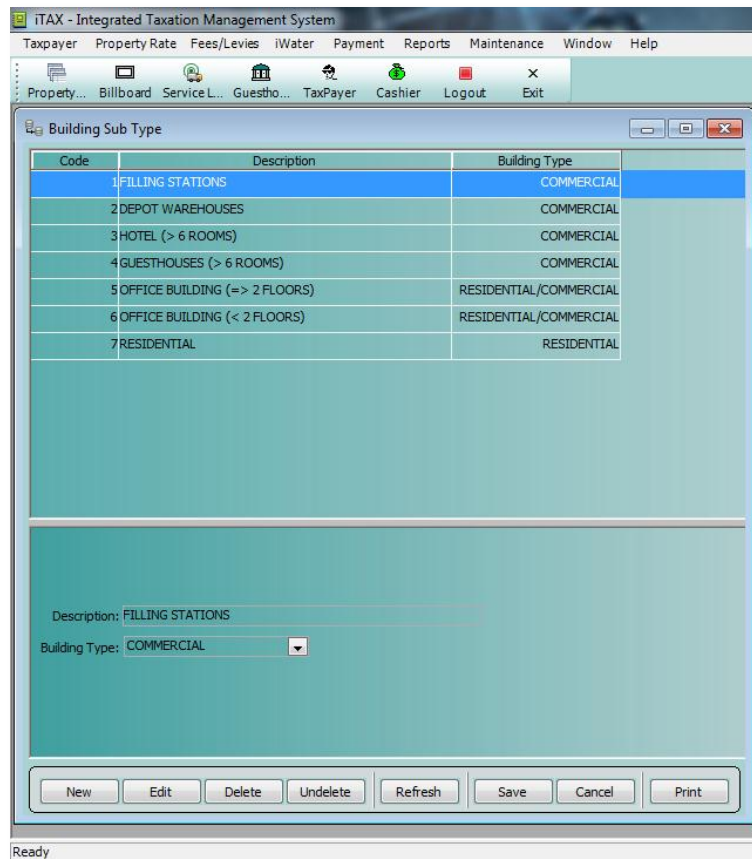


Figure 1i. The Building Sub-type windows.

This window allows the user to set the building subtypes as specified by the local laws set by the Local Government Authorities.

For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).

3. System Variables

System Variable is a function that will enable the user to configure the system. Configure in such a way that the system will work according to the specification of a particular LGA. For example, the calculation of penalty, setting the required fields and so on.

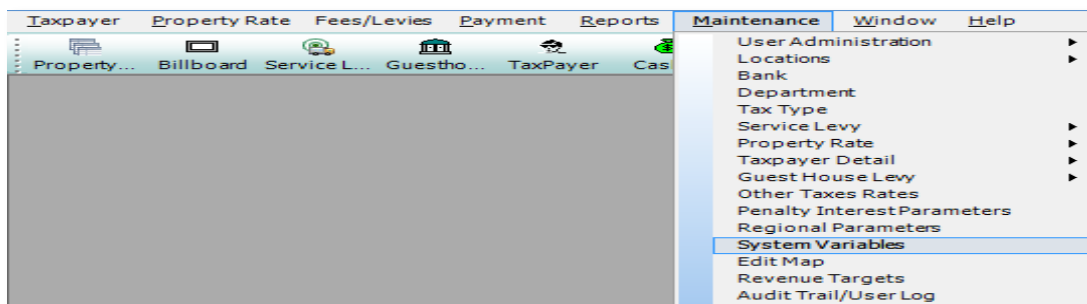


Figure 10a – Security Administration and Security Admin Menu

Go to Maintenance Menu > System Variables

Description	Tag Value	Tag
GENERAL		
District	0905	DISTRICT NAME
Files location after exported to excel for epicor.	C:\TAX_SC\EPICOR\	EXPORTPATH
Country	TANZANIA	COUNTRY NAME
Picture storage location	C:\TAX_SC\pictures\	PICTURE FILE STORAGE PATH
Ward	905022	MUNICIPAL_ID

A

B

Tag Group : GENERAL
 Tag : DISTRICT CODE
 Description: District
 Tag Value: 0905

New Edit Delete Undelete Refresh Save Cancel Print

Figure 10b – System Variable Window

A. Add new setting

1. Click NEW button. Please refer to figure 10b.
 - **Tag Group** is a lists of modules available in the system.
 - **Tags** is the lists of all the settings for a specific module in the system.
2. Key in the necessary data in the Tag Values and Description.
3. Click SAVE button to save the setting.

4.2 Edit Setting

1. Select the desire data in label (A) you want to edit. Please refer to figure 10b
2. Click EDIT button.
3. After you apply the changes, Click SAVE.

4. Locations

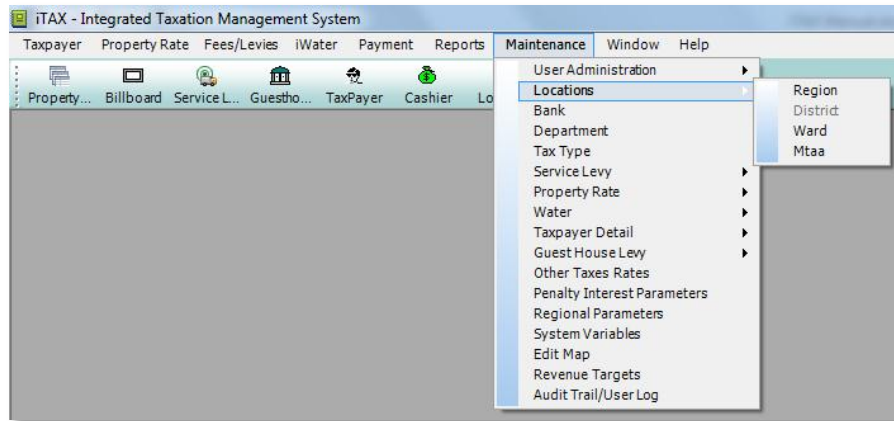


Figure 2a. Accessing the Locations maintenance.

The locations maintenance is where the values for the Region, District, Ward and Mtaa data are set which are used all throughout the system.

A.Region

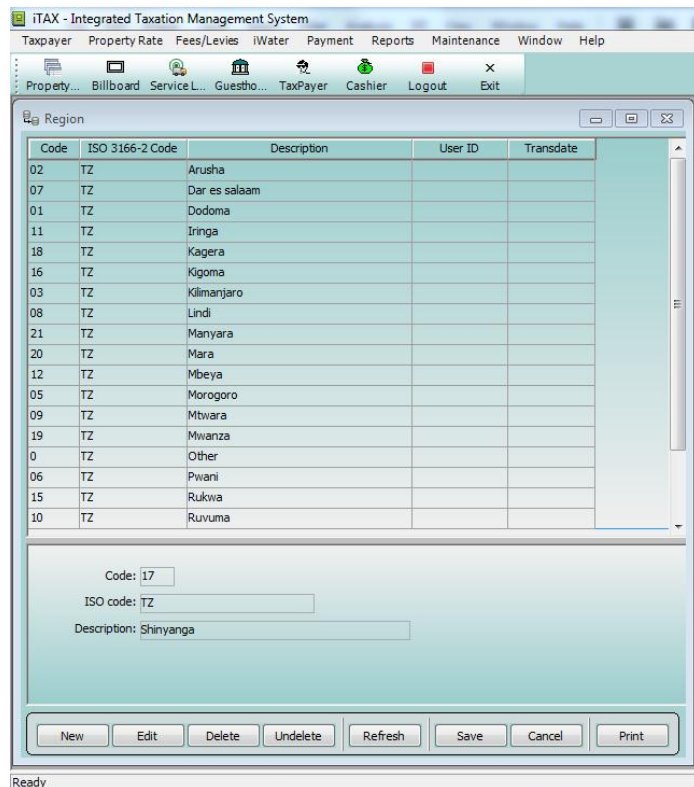


Figure 2b. The Region maintenance window.

This is where the regional names are set along with the official code numbers.

For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).

B. District

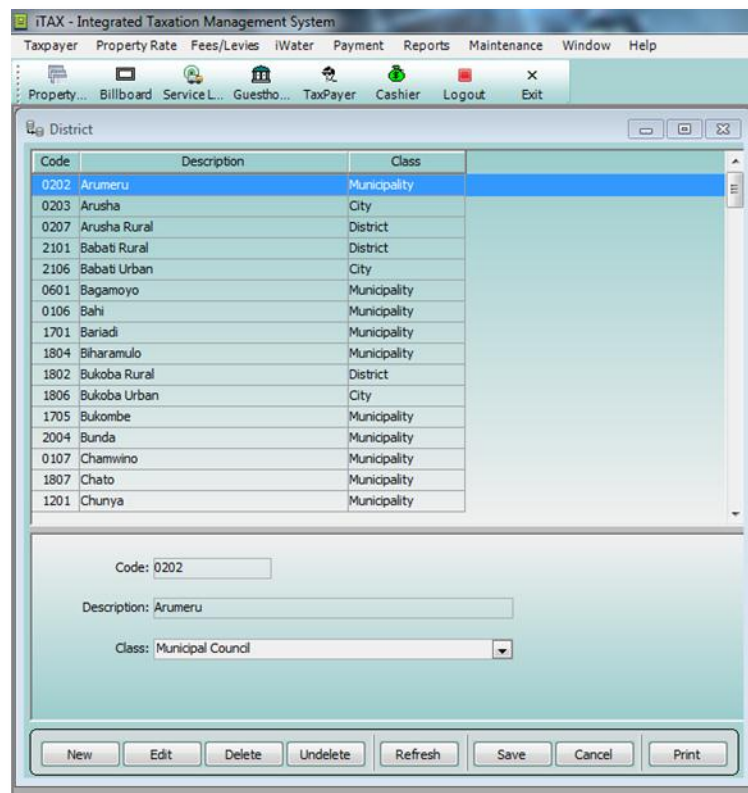


Figure 2c. The District maintenance window.

This window is where the district names are maintained. Each district's class is also set here, the class refers to the kind of the district as specified by Tanzanian law.

For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).

C. Ward

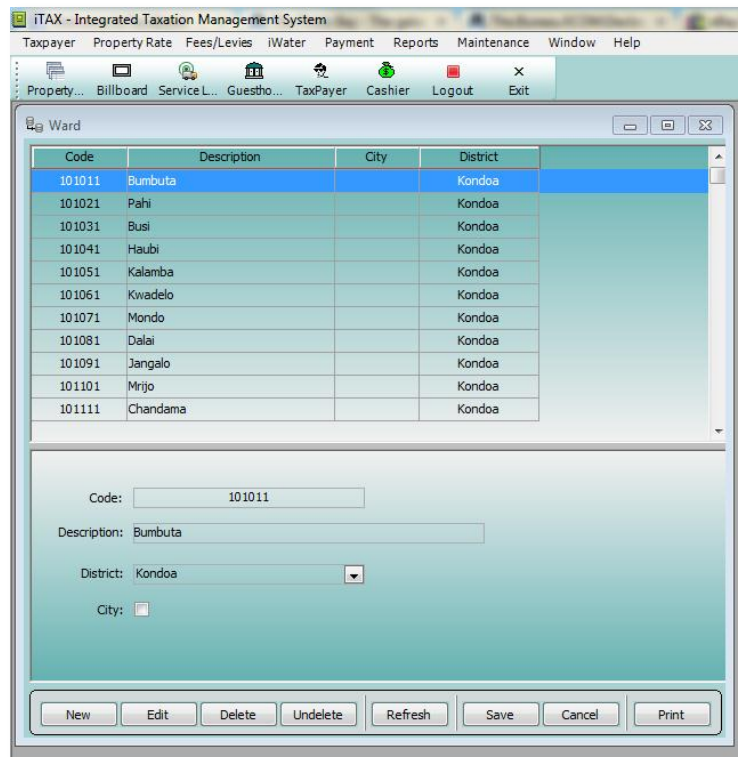


Figure 2d. The Ward maintenance window.

This window is where the ward names are maintained. The district in which the ward belongs to is set here.

For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).

D.Mtaa

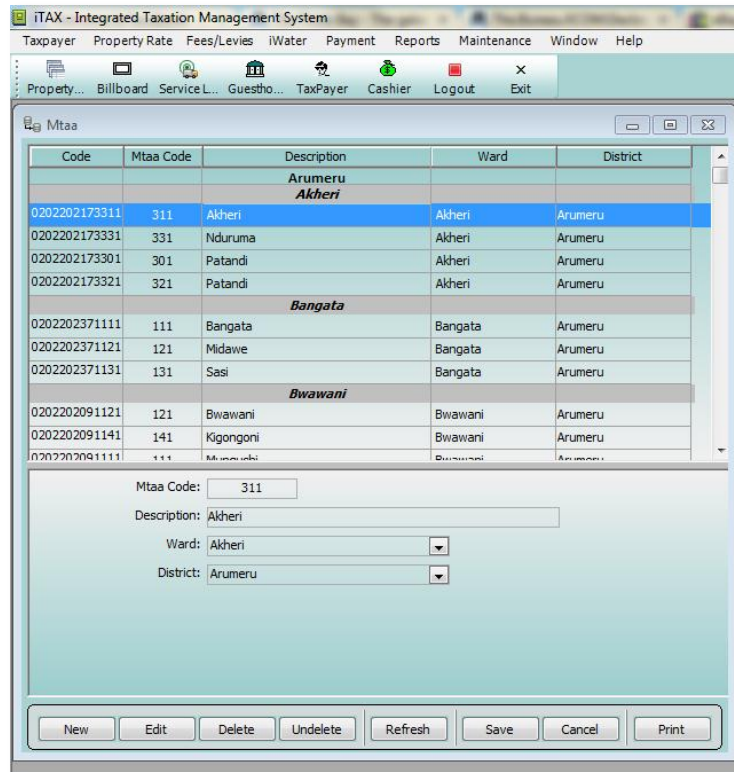


Figure 2e. The Mtaa maintenance window.

The mtaa names and their official code is set in this window. The saved rows also displays each mtaa's ward and district and the records are grouped according to: district, ward and then alphabetical order of the mtaa name.

For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).

5. Taxpayer

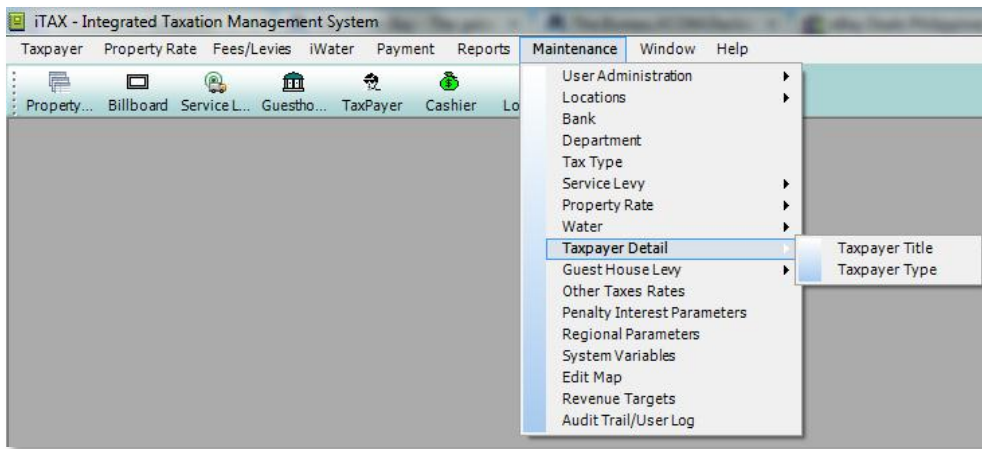


Figure 3. How to access the Taxpayer maintenance.

This is where the taxpayer's title and type are maintained. The title is mostly for presentation purposes only like for a displaying in a bill. The type however is more critical since it might be used in tax computations by the system.

For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).

6. Service Levy

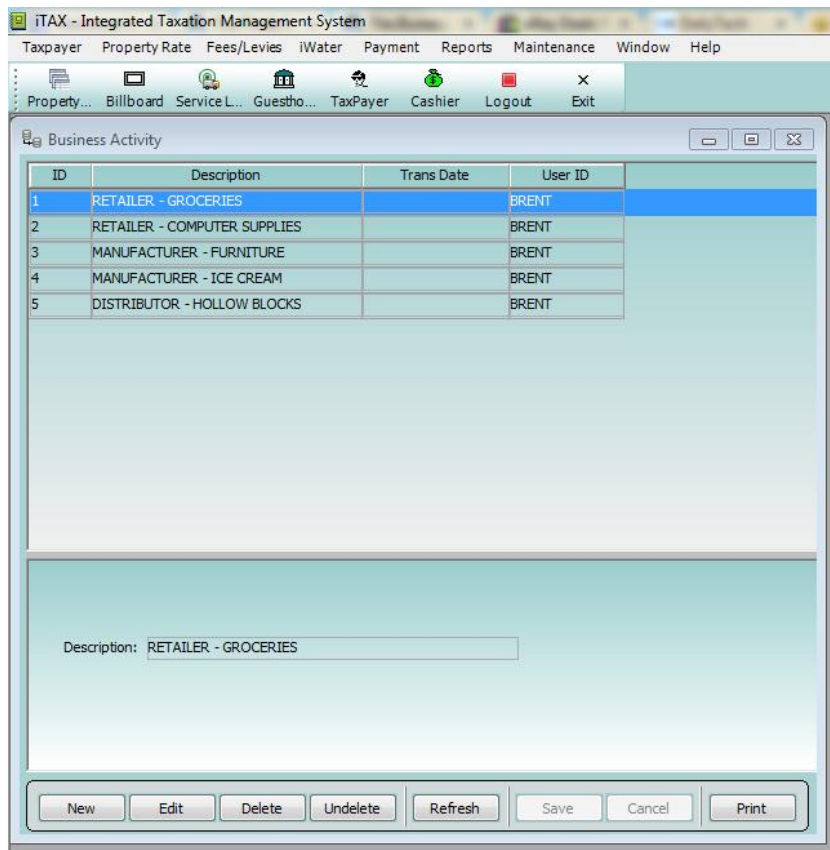


Figure 4. The Service Levy's Business Activities maintenance window.

The different Business Activities used in the Service Levy module are maintained here.

For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).

7. Guest House Levy

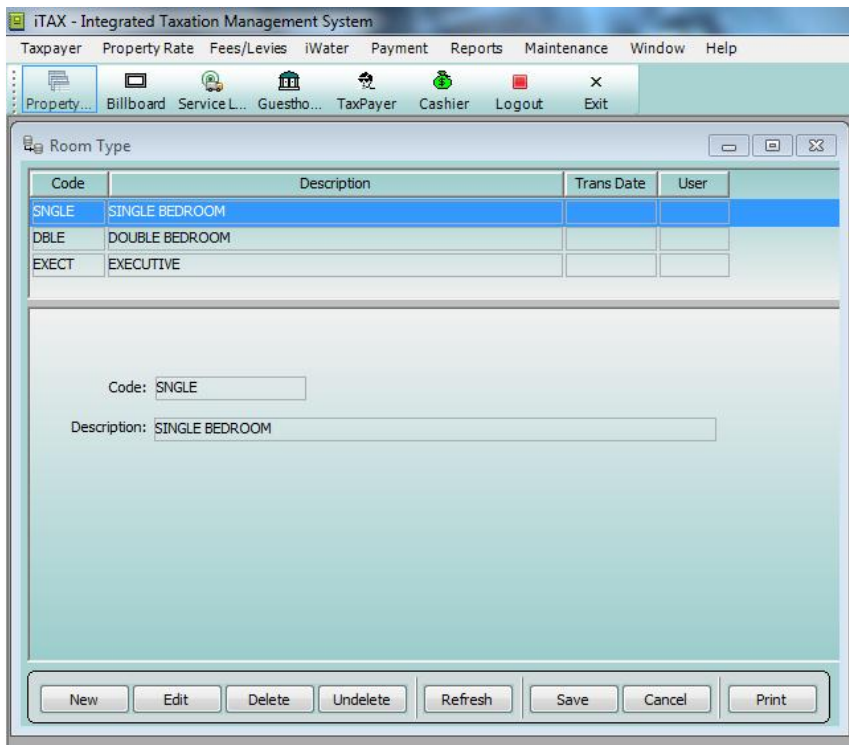


Figure 5. The Guest House Levy's Room Type maintenance window.

The types of hotel rooms used in the Guesthouse Levy module are maintained here.

For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).

8. Revenue Targets

The screenshot shows the 'Annual Revenue Targets' window in the iTAX system. The window has a menu bar with options: Taxpayer, Property Rate, Fees/Levies, iWater, Payment, Reports, Maintenance, Window, and Help. Below the menu bar is a toolbar with icons for Property..., Billboard, Service L..., Guestho..., TaxPayer, Cashier, Logout, and Exit. The main area contains two tables, both showing revenue targets for the year 2013. The first table has 6 rows, and the second table has 12 rows. Each row includes a Tax Year, Revenue Description, Amount, and User ID. The Amount for all entries is 1,000,000.00. At the bottom of the window is a button panel with buttons for New, Edit, Delete, Undelete, Refresh, Save, Cancel, and Print.

Tax Year	Revenue Description	Amount	User ID
2013	Abattoir slaughter service fee	1,000,000.00	
2013	Advertising fee	1,000,000.00	
2013	Artificial insemination service fee	1,000,000.00	
2013	Auction mart fees	1,000,000.00	
2013	Beans Crop cess	1,000,000.00	
2013	Building materials extraction license fee	1,000,000.00	

Tax Year	Revenue Description	Amount	User ID
2013	Abattoir slaughter service fee	1,000,000.00	
2013	Advertising fee	1,000,000.00	
2013	Artificial insemination service fee	1,000,000.00	
2013	Auction mart fees	1,000,000.00	
2013	Beans Crop cess	1,000,000.00	
2013	Building materials extraction license fee	1,000,000.00	
2013	Building permit fee	1,000,000.00	
2013	Building valuation service fee	1,000,000.00	
2013	By law fines	1,000,000.00	
2013	CIUP	1,000,000.00	
2013	Central bus stand fees	1,000,000.00	
2013	Cesspit emptying service fee	1,000,000.00	

Figure 6. The Revenue Targets maintenance window.

The Revenue Targets window presents the user with all the tax/fee types that had been entered in the system and allows the user to enter a year and collection target for that year. The data entered in this window is mostly used reports.

For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).

9. Penalty Interest Parameters

The screenshot shows the 'Penalty Interest Parameters' window in the iTAX system. The window has a menu bar with 'Taxpayer', 'Property Rate', 'Fees/Levies', 'iWater', 'Payment', 'Reports', 'Maintenance', 'Window', and 'Help'. Below the menu is a toolbar with icons for 'Property...', 'Billboard', 'Service L...', 'Guestho...', 'TaxPayer', 'Cashier', 'Logout', and 'Exit'. The main area contains a table with the following data:

ID	Tag	Description	Rate	Classcode	Valid from	Validuntil	Used by
13	BAND	2012 BAND #1 - 20,000.00	20,000.00		01/01/1982		RPT
14	BAND	2012 BAND #2 - 30,000.00	30,000.00		01/01/1982		RPT
15	BAND	2012 BAND #3 - 40,000.00	40,000.00		01/01/1982		RPT
6	DPF	Up to 3 years	0.90		01/01/1982		RPT
7	DPF	More than 3 years but less than 7 years	0.80		01/01/1982		RPT
8	DPF	7 to 9 years	0.70		01/01/1982		RPT
9	DPF	More than 9 years but less than 7 years	0.60		01/01/1982		RPT
10	DPF	13 to 15 years	0.50		01/01/1982		RPT
11	DPF	More than 15 years but less than 19 years	0.40		01/01/1982		RPT

Below the table is a form for editing a parameter. The form contains the following fields:

- Description: 2012 BAND #1 - 20,000.00
- Valid from: 01/01/1982
- Tag: Property Rate Tax Band
- Valid to: 00/00/0000
- Value: 20,000.0000
- Used by: Property Rate

At the bottom of the window are buttons for 'New', 'Edit', 'Delete', 'Undelete', 'Refresh', 'Save', 'Cancel', and 'Print'.

Figure 7. The Penalty-Interest Parameters maintenance window.

This is a generic window used to maintain simple, flat rates for certain modules in the system. For example, for the property rates window the tax bands are added, edited or deleted here since tax bands are not graduated rates.

For information to use this window, refer to [USING THE ITAX MAINTENANCE WINDOW](#).

10. Audit Trail

Audit Trail plays an important role in the system, it can trace a particular transaction made by a certain users.

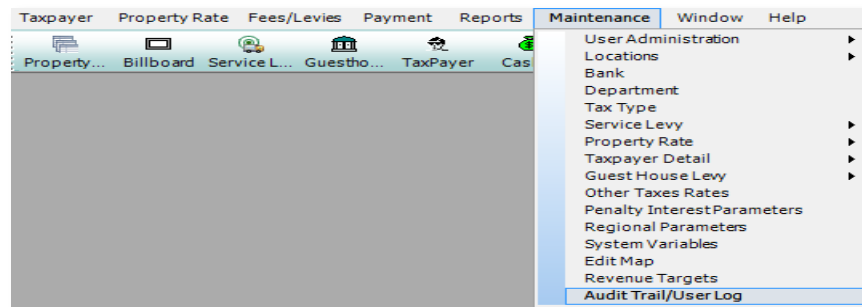


Figure 8a – Maintenance – Audit Trail/ UserLog Menu

Go to Maintenance Menu > Audit Trail/User Log. The Audit Trail window will display.

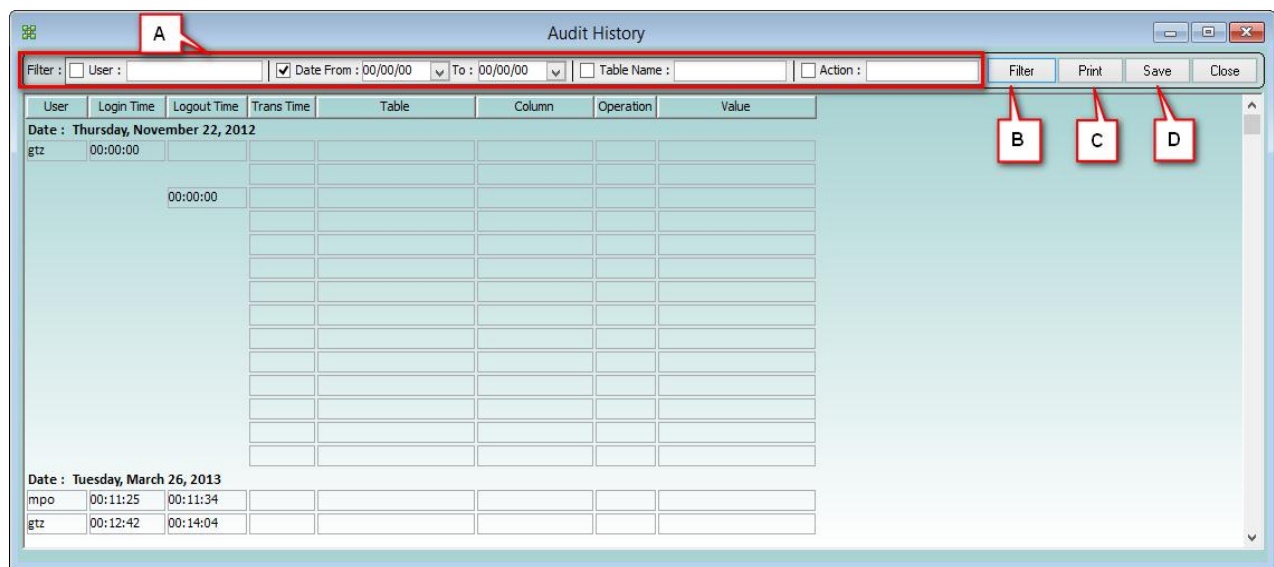


Figure 8b –Audit Trail/ User Log Window

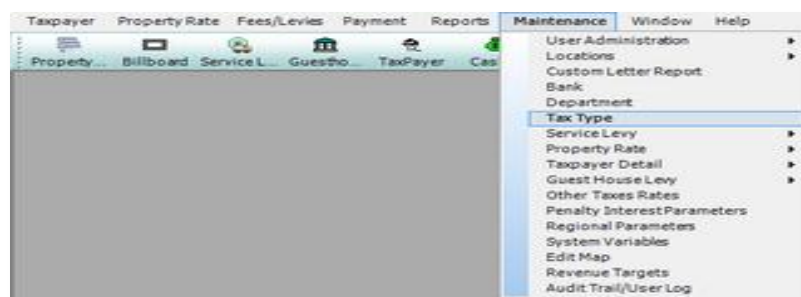
- (A) Shows the different type of criteria the user can use to filter the result.
- (B) After the user select the filter criteria the FILTER button will filter the result.
- (C) The user can also generate report by clicking the PRINT button.
- (D) The user can also SAVE the data using the SAVE button.

11. Tax Types and Other Taxes

The Other Receipts module handles the collections for other taxes.

To use this module, the LGA has to meet the requirement of Local Revenue Code. This is the basis for encoding the kind of tax and rates.

STEP 1 in using the Other Receipts Module: Filling out of Maintenance Tables with the complete data in the following order:



Go to > Maintenance > Tax Type

Figure 9a – Maintenance – Tax Type

Code	Parent	English Description	Swahili Description	Parent Description	AccountCode	Other Receipt	Kasma	Cost Centre Code
61		Advertising fee	Ada ya Matangazo ya Biashara		140351	☒	140351	
83		Artificial insemination service fee	Ada ya uhamilishaji mifugo		140389	☒	140389	
84		Auction mart fees	Ada ya Minada		140390	☒	140390	
69		Building materials extraction license fee	Ada ya Leseni ya Uchimbaji wa Madini Ujenzi		140375	☒	140375	
74		Building permit fee	Ada ya Vibali vya Ujenzi		140380	☒	140380	
85		Building valuation service fee	Ada ya Kuthamini Majengo		140391	☒	140391	
77		By law fines	Tozo za Sheria Ndogo		140383	☒	140383	
86		Central bus stand fees	Ushuru wa Vituo vya Mabasi		140392	☒	140392	
88		Cesspit emptying service fee	Ushuru wa Kunyonya Maji Taka		140394	☒	140394	
41		Child Survival Development program UNICEF Gr	Mradi wa Maendeleo ya Mtoto - Ruzuku ya UNICEF		130118	☒	130118	
33		CIUP	Mradi wa Uboreshaji Miundombinu ya Jamii		130110	☒	130110	
89		Clean water service fee	Ushuru wa Huduma ya Maji Safi		140395	☒	140395	

Code:

Parent Code:

English Description:

Swahili Description:

Kasma:

Cost Centre Code:

Other Payments?: ☒

New Edit Delete Undelete Refresh Save Cancel Print

Figure 9b - Tax Type window

1. To add a new Tax Type, click the NEW button. Key in all the necessary fields on the pane below.
2. To edit an existing Tax Type, select the item on the pane above, then click the EDIT button. Make the necessary changes.
3. To delete a Tax Type, select the item on the pane above and then click the DELETE button. To undo the deletion, click the UNDELETE button and select from the Restore window the item, then click the OK button.
4. Click the SAVE button to save the additions and modifications made.

12. iTAX Security: User Admin

iTax Tanzania needs to define the users based on their organizational chart or designation.

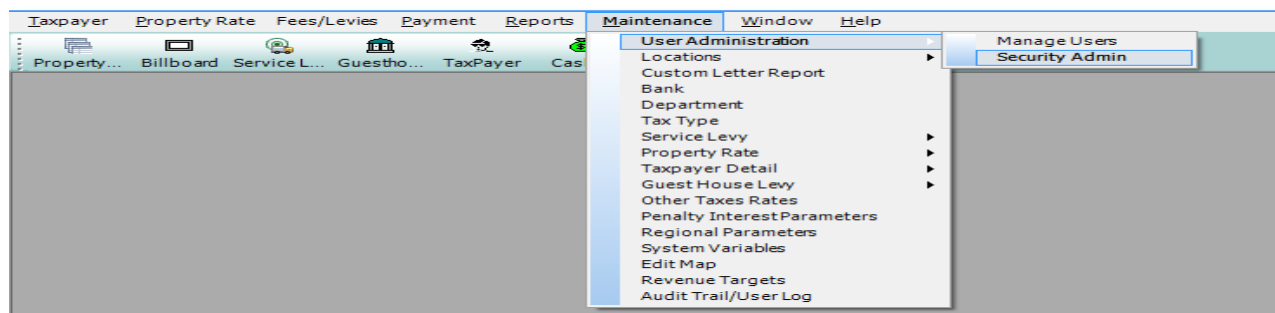


Figure 21a – Security Administration and Security Admin Menu

Go to Maintenance Menu > User Administration > Security Admin. The Security Admin window will display.

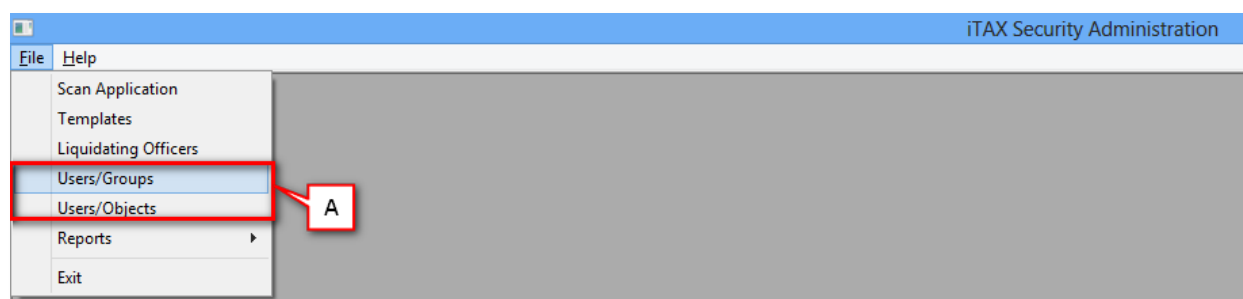


Figure 11b – Security Admin Window

Figure 2 is an actual screenshot of the Security Admin window. The Menu (A) of the window is an option for adding/assigning a user, adding a group, assigning user to a groups and set the user rights to a particular window based on the user's designation.

Adding Users and Groups

Click the Users/Groups in the menu. Please refer to figure 11b.

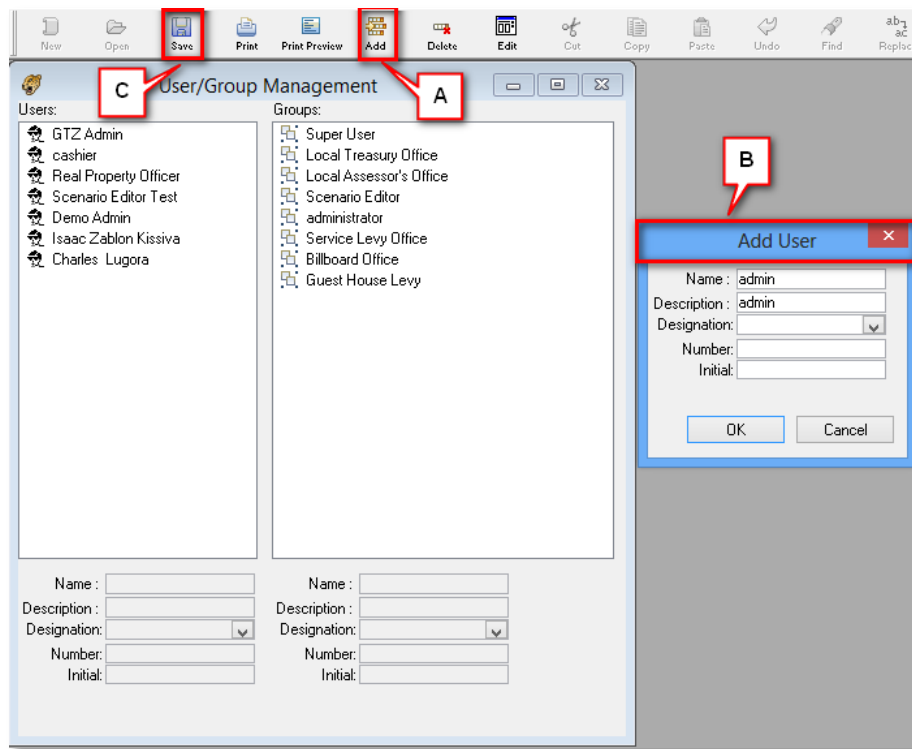


Figure 11c – Security Admin – Adding New User

1. Click in the Users Pane if you want to add user and Groups Pane for groups.
2. Click the ADD button (A) to add a new user.
3. Input data by keying in the name and description in the textfields. Please refer to Figure 11c (B). Make sure details are provided in these text fields.
4. Click the SAVE button (C) to add new user.

NOTE: If there are more than 1 missing data item, simply click the CANCEL button and provide details of required data items.

Assigning Roles to Users

1. Please refer to Figure 11c. Drag the user to its designate group.
2. Click the SAVE (C).

13. Changing Logos

All the logos displayed by the system depend on files kept in the \logo subfolder in the application's main folder (by default it should be C:\Program Files\iTAX\). The names of the files are **ProvinceLogo.jpg** (for the region logo) and **CityMunLogo.jpg** (for the city or municipality's logo). It is important that these names are not changed. To change the current logo that the system is using, simply overwrite these files with the

image file of the correct logos. For the Director's electronic signature, the file name is `mundir.gif` and for the Treasure's signature is `treasSignature.gif`. The location is the same with the logo.